How to Fill Out Role Review

Review the users, positions and roles that are provided on the spreadsheet.
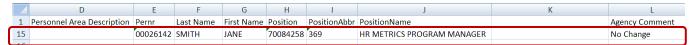
Review the following:

- HCM roles that are assigned to the position under the **Role** section

- BI roles that are assigned under the **BI Role** section

  - **If only General Access role is assigned check the Professional Portal account for that user to make sure it is a Web GUI user.**

  - **If NOT a Web GUI user then the BI account is not needed and needs to be removed.**

  - If the user a is BI only user ensure there is an agency data_profile role(s) assigned in HCM

- The OOSB entry under **Authprofile** section

  - Authprofile(s) should match the data_profile role(s) on the position

  - WA_SOW should have a corresponding SR3P_DE_PERS_ADMIN_PROC role

If you see that a user account needs changes enter **Change** in the **Agency Comment** column across from user information.

	D	E	F	G	H	I	J	K	L
1	Personnel Area Description	Pernr	Last Name	First Name	Position	PositionAbbr	PositionName		Agency Comment
2	Dept of Personnel								
3		00023187	DOE	JOHN	70005879	152	OFF ASST 3		Change

If there are no changes needed enter **No Change** in the **Agency Comment** column across from user information.

	D	E	F	G	H	I	J	K	L
1	Personnel Area Description	Pernr	Last Name	First Name	Position	PositionAbbr	PositionName		Agency Comment
15		00026142	SMITH	JANE	70084258	369	HR METRICS PROGRAM MANAGER		No Change

Specify what changes need to be made.

- If the role need to be added in HCM or BI enter **Add 'Role Name' role** in the **Agency Comment** column anywhere near the Role or BI Role section.

Role	
SR3P_1110_DATA_PROFILE	
SR3P_DE_ORG_MANG_PROC	Remove
SR3P_DE_PAY_PROC	Remove
SR3P_DE_PAY_INQ	Add Time Inquirer role

- If a role needs to be removed enter **Remove** next the role that needs to be removed.

Role	
SR3P_1110_DATA_PROFILE	
SR3P_DE_ORG_MANG_PROC	Remove
SR3P_DE_PAY_PROC	Remove
SR3P_DE_PAY_INQ	Add Time Inquirer role

- If all roles needs to be removed from a position or BI account needs to be removed enter **Remove** next to the **Role** or **BI role**

SR3P_DE_QUALADM	
Role	Remove
ZS_BI_GENERAL_ACCESS	
Authprofile	

Complete example:

D	E	F	G	H	I	J	K	L
Personnel Area Description	Pernr	Last Name	First Name	Position	PositionAbbr	PositionName		Agency Comment
Dept of Personnel								
	00023187	DOE	JOHN	70005879	152	OFF ASST 3		Change
							Role	
							SR3P_1110_DATA_PROFILE	
							SR3P_DE_ORG_MANG_PROC	Remove
							SR3P_DE_PAY_PROC	Remove
							SR3P_DE_PAY_INQ	Add Time Inquirer role
							SR3P_DE_QUALADM	
							Role	Remove
							ZS_BI_GENERAL_ACCESS	
							Authprofile	
							WA_1110	
	00026142	SMITH	JANE	70084258	369	HR METRICS PROGRAM MANAGER		No Change
							Role	
							SR3P_1110_DATA_PROFILE	
							SR3P_DE_PERS_ADMIN_PROC	
							SR3P_DE_ORG_MGT_INQ	
							Authprofile	
							WA_1110	
							WA_SOW	